

100

EZ-Broker

Internet based solution for all phases of the structured settlement process

- ▶ One time input or download of case data
- ▶ Can be used online or offline
- ▶ Diary functionality includes automatic reminders
- ▶ Interfaces with embedded life company software for quoting and illustration
- ▶ Proposal management systems allows full customization
- ▶ Integrated post-settlement document processing
- ▶ Modification of documents as permitted by life companies
- ▶ Save print, fax and e-mail capabilities for any documents within the software
- ▶ Integrated life case plans and economic loss analysis through StructureOnline partners
- ▶ Automatic referral of cashouts and upfront cash to designated Financial Planners
- ▶ Data archiving and reporting available through StructureOnline
- ▶ Interfaces with broker company systems

120

EZ-Lead (EZ-Broker included)

Employs data mining and knowledge technology to identify structure candidates in claims systems

- ▶ Electronic interface with claims systems
- ▶ Automatic analysis of claims to identify structure opportunities
- ▶ Knowledge based system proposes appropriate structure products
- ▶ Claims users can propose structure programs or forward referrals to brokers

130

EZ-Reports (for Brokers)

Full-featured reporting module for EZ-Broker

Local:

- ▶ Full sort and selection criteria (e.g. by life company, client-broker)
- ▶ Open cases
- ▶ Settled cases
- ▶ Closed cases
- ▶ Premium and/or commission totals
- ▶ Case related assignments for support staff
- ▶ Many more will be defined and developed as per industry need

Remote:

- ▶ Any Reports out of the Archived Data
- ▶ Many more will be defined and developed per industry need

Fig 1A

140

EZ-Reports (for Life Companies)**Full-featured reporting module for Life Company Executives**

- ▶ Full sort and selection criteria (e.g. by broker company, individual broker insurer)
- ▶ Premium and number of cases funded
- ▶ Cases quoted
- ▶ Premium by structure product
- ▶ Cases accepted/rejected under partnership arrangements (last right of refusal)
- ▶ Cash referred to financial planners
- ▶ Many more will be defined and developed as per industry need

150

EZ-Updates**Internet-based support for delivery of life company software, updates and rate changes**

- ▶ All functions are provided through the StructureOnline portal
- ▶ Download of life company software by authorized parties
- ▶ Distribution of software upgrades and patches
- ▶ Distribution of rate changes
- ▶ Automatic notification of updates to EZ-Broker users

StructureOnline Services

160

EZ-Sync**Allows full-use of StructureOnline's broker services by broker companies, individual brokers and support staff**

- ▶ Allows brokers to download portable version of EZ-Broker for use offline
- ▶ Brokers and support staff can synchronize their work, data, schedule, diary cases, etc.
- ▶ Software updates are executed automatically
- ▶ Rate changes are made automatically

170

EZ-Support**StructureOnline help desk for life companies and brokers**

- ▶ Technical support for life company software
- ▶ Support for life products
- ▶ Maintain latest life company software on the web for download
- ▶ Maintain latest software patch for life company, software on the web for download
- ▶ Maintain rate changes on the web as publication
- ▶ Other services based on user demand

180

Alternative Dispute Resolution Provider Affiliation**Brings a new source of cases to the structure industry**

- ▶ Custom templates for ADR web pages
- ▶ Allows structured settlements to be offered as part of the ADR process
- ▶ Structure products from participating life companies offered through StructureOnline
- ▶ Referral of cases to participating brokers facilitated by StructureOnline

Fig. 1B

190

Online Broker (Web version of EZ-Broker)

Allows easy access to structure products to qualifying professionals, generates new structure business

- ▶ Service offered to qualified parties via the Internet
- ▶ StructureOnline facilitates company approval and licensing issues

FIG. 1C

Creating a New Case

Caseinfo Client Claimant Defendant Attorney Insurer Broker Payee Fact sheet

Enter New Case Information

*Case Caption	Larry vs. Whurpool	Date of Loss	12/12/2001
Case Type	Commercial	* Subtype	Medical
Priority	Low	Conference Date	
Litigation	Yes	Trial Date	
St. Jurisdiction	CA - California	Venue	Select
Source Ref.	File Review	Broker of Record	Yes
*Broker	Sam Dorris		
Notes			

Add Cancel

- **Mandatory Field Requirements for opening a case**
 - Case Caption
 - Broker and Broker of Record

FIG 3

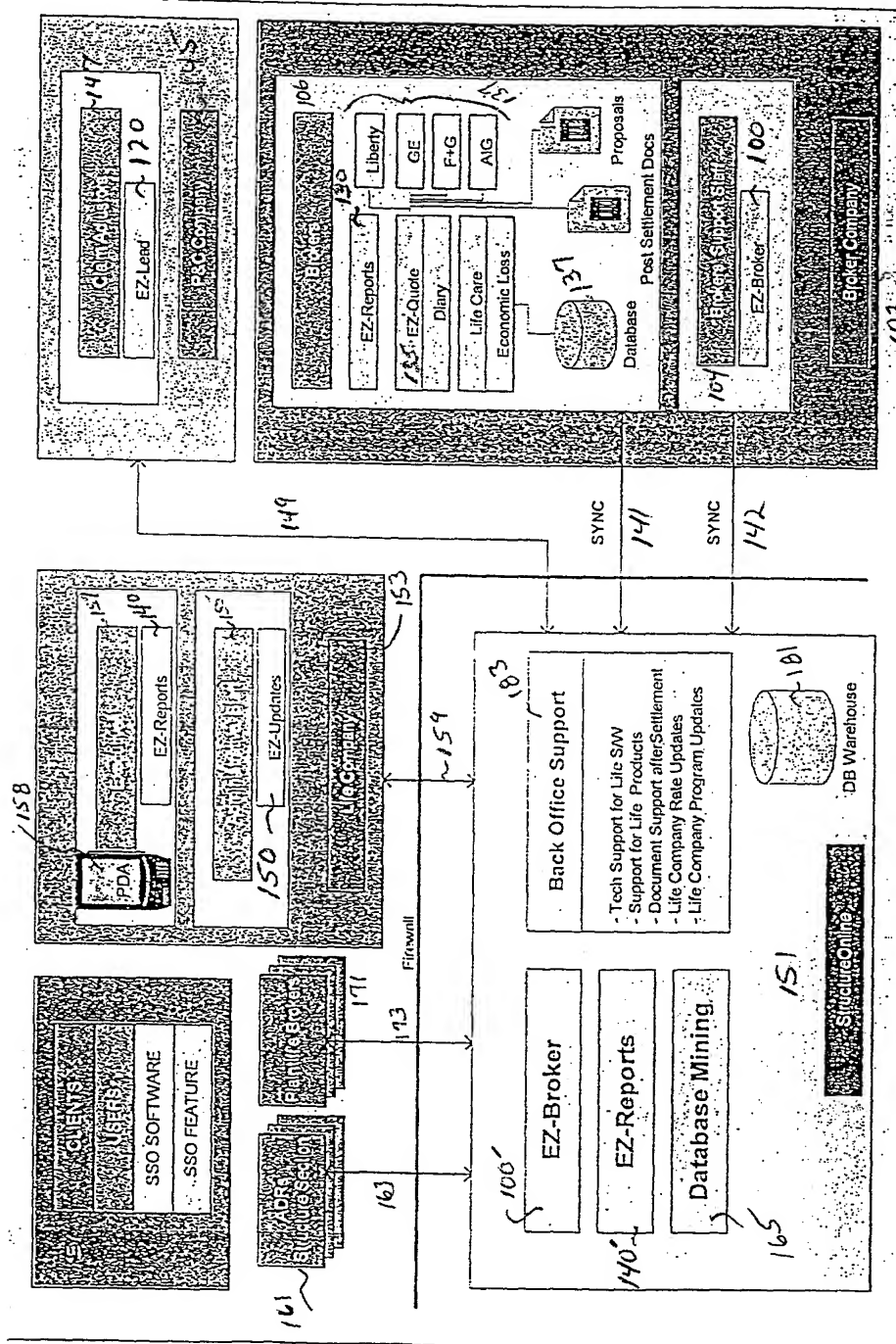


FIG. 2

5/33

Creating a New Case (continued)

- Add / Edit Insurer Client Information from Client Tab
- National Account Check Box for narrowing your search
- Mandatory fields for Insurer
 - Insurer Company Name
 - Date of Case Receipt

The screenshot shows a software interface for creating a new case. At the top is a navigation bar with icons for Client, Claimant, Defendant, Attorney, Insurer, Broker, Payee, and Fact Sheet. The 'Client' tab is selected. Below the navigation bar is a 'Select Client' dropdown menu. The main form area is titled 'Select Insurer'. It contains several input fields: 'Search Group' and 'Search Company' (both empty), a 'National Account' checkbox (checked), and a 'Search' button. Below these are dropdown menus for 'Company' (set to 'Allstate Insurance Company'), 'Branch' (set to 'Select Branch'), 'Contact' (set to 'Select Contact'), 'L.O.B.' (set to 'Commercial/Claims'), and 'Region' (set to 'Select Region'). At the bottom, there is a 'Case Details' section with fields for 'Claim No.', 'Date of Assign', 'Reserved Amount', 'Authorized Amount', and 'Recent Offer'. There are also 'Add' and 'Cancel' buttons at the very bottom.

FIG 4

Creating a New Case (continued)

- Add / Edit Law Firm Client Information from Client Tab

The screenshot shows the same software interface as Figure 4, but with the 'Attorney' tab selected. The 'Select Client' dropdown menu is now set to 'Attorney'. The main form area is titled 'Select Attorney'. It contains dropdown menus for 'Attorney Type' (set to 'Select') and 'Law Firm' (set to 'Select'). There is also a 'Search by Firm' field with a 'Search' button. Below these are dropdown menus for 'Attorney' (set to 'Select') and 'Notes'. At the bottom, there are 'Add' and 'Cancel' buttons.

- Mandatory fields for Law Firm
 - Attorney Type
 - Law Firm Name
 - Attorney Name

FIG 5

Creating a New Case (continued)

▪ **Add / Edit TPA Client Information from Client Tab**

- **Mandatory fields for TPA**
 - TPA Company Name

FIG 6

Creating a New Case (continued)










▪ **Add / Edit Other Client Information from Client Tab**

- **Mandatory fields for Other Client**
 - Other Company Name

FIG 7

Creating a New Case (continued)

- **Add / Edit Claimant Information from Claimant Tab**

 Casefile	 Client	 Claimant	 Defendant	 Attorney	 Insurer	 Broker	 Payee	 Fact sheet
--	--	--	---	--	---	--	---	--

Contact Details

Claimant Type: Company:

Prefix: First Name: Middle Name: Last Name: Suffix:

Address: City: State: Zip: Country:

Phone Day: Phone Cell: Phone Fax:

Email: Pager:

Personal Details

Birth Dt - Age: 57 Sex: SSN:

Occupation: Education: Annual Income:

Case Details

Primary Injury:

Demand Amt: Structured Amt: Upfront Cash:

Notes:

Supplemental Benefits: SSDI: SSI: Medicare: Long Term Care: Food Stamps: Other:

FIG 8

Creating a New Case (continued)

Bank Info

Mail Annuity Payment To ☐ Annuitant Address ☐ Bank Account ☐ Payee

Bank Name Address Address

City State Zip

Account Account No. Routing No.

Name

Add Cancel

- **Mandatory fields for Claimant**
 - **First Name and Last Name**
 - **Date of Birth and Age**

- **Contact Details**
- **Personal Details**
- **Case Details**
- **Bank Information**

FIG 9

8/33

Creating a New Case (continued)▪ **Add / Edit Insured Defendant Company Information from Defendant Tab**

- **Mandatory fields for Insured Defendant**
 - Company Name

FIG 10

Creating a New Case (continued)▪ **Add / Edit Plaintiff Attorney Information from Attorney Tab**

- **Mandatory fields for Plaintiff Attorney**
 - Attorney Type
 - Law Firm
 - Attorney Name

FIG 13

9/33

Creating a New Case (continued)

- Add / Edit Insured Defendant Individual Information from Defendant Tab

The screenshot shows a web application interface with a navigation bar at the top containing icons for Caseinfo, Client, Claimant, Defendant, Attorney, Insurer, Broker, Reinsurer, and Fact Sheet. The 'Defendant' tab is selected. Below the navigation bar is a 'Select Defendant' form. The form includes a 'Select Defendant' dropdown menu, a 'Search Name' text box with a 'Search' button, a 'Policy Number' text box, a 'Policy Amount' text box, and a 'Notes' text area. The 'Insured Type' is set to 'Insured' and the 'Defendant Type' is set to 'Individual'. At the bottom of the form are 'Add' and 'Cancel' buttons.

- Mandatory fields for Individual Insured Defendant
 - Defendant Type

FIG 11

Creating a New Case (continued)

- Add / Edit Self Insured Defendant Information from Defendant Tab
- Mandatory fields for Self Insured Defendant
 - Company name

The screenshot shows the same web application interface as Figure 11, but with the 'Self Insured' option selected in the 'Insured Type' dropdown. The 'Select Defendant' form now includes a 'Select Company' dropdown menu in addition to the 'Search Name' text box. The 'Policy Number' and 'Policy Amount' text boxes are still present. The 'Notes' text area and 'Add'/'Cancel' buttons are also visible.

FIG 12

10/33

Creating a New Case (continued)

▪ Add / Edit Defense Attorney Information from Attorney Tab

▪ Mandatory fields for Defense Attorney

- Attorney Type
- Law Firm
- Attorney Name

FIG 14

Creating a New Case (continued)

▪ Add / Edit Insurer Information from Insurer Tab

▪ Mandatory fields for Insurer

- Company Name

FIG 15

11/33

Creating a New Case (continued)

Add / Edit Broker Information from Broker Tab

CaseinfoClientClaimantDefendantAttorneyInsurerBrokerPayeeFact sheet

Sami Dennis |

Select Broker

Company*Structured Financial AssociatesLast NameSearch

Broker*SelectBroker of Rec.No

Commission0 (%)Prod. Credit0 (%)

Notes

AddCancel

Mandatory fields for Broker

Broker Company Name

Broker Name

FIG 16

Creating a New Case (continued)

Add / Edit Payee Information from Payee Tab

Mandatory Fields

First Name

Last Name

CaseinfoClientClaimantDefendantAttorneyInsurerBrokerPayeeFact sheet

Hall Mike |

Contact Details

Claimant*Hall MikeTypeSelect

PrefixFirst NameMiddle NameLast NameSuffix

AddressAddress2City

StateSelectZipCountrySelect

Phone DayPhone EveEmailPhone CellPager

Personal Details

Birth Dt-Age02/22/195537SexSelectSSNUnfrank Cash

Notes

AddCancel

FIG 17

12/33

Creating a New Case (continued)

▪ Add / Edit Beneficiary Information from Payee Tab

The screenshot shows a form titled "Beneficiary". Under the heading "Enter Details", there are four input fields: "Name" (a text box), "Type" (a dropdown menu with "Select" visible), "Share(%)" (a text box), and "Notes" (a larger text area). At the bottom of the form are two buttons: "Add" and "Cancel".

▪ Mandatory Fields

- Name

FIG 18

Managing your Diary

▪ Types of Companies

- Assignment Company
- Broker Company
- Insured Defendant
- Insurance Company
- Law Firm
- Life Company
- Other
- Self Insured Defendant
- TPA

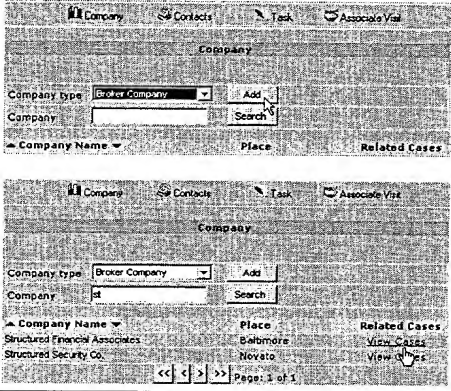
The screenshot shows a form titled "Company". At the top, there are tabs for "Company", "Contacts", "Task", and "Associate Visit". Below the tabs, there is a "Company type" dropdown menu with "Select Company Type" visible. To the right of the dropdown is a "Search" button. Below these elements is a list of company types: "Assignment Company", "Law Firm", "Broker Company", "Insured Defendant", "Insurance Company", "Life Company", "Other", "Self Insured Defendant", and "TPA". To the right of the list, there are two columns labeled "Place" and "Related Cases".

FIG 19

13/33

Managing your Diary

- **Open your Diary & Search & Sort / Add a Company by Type**



- **View Cases related to Company from search result**

FIG 20

Managing your Diary

- **Categories of Companies**
 - Public
 - Private

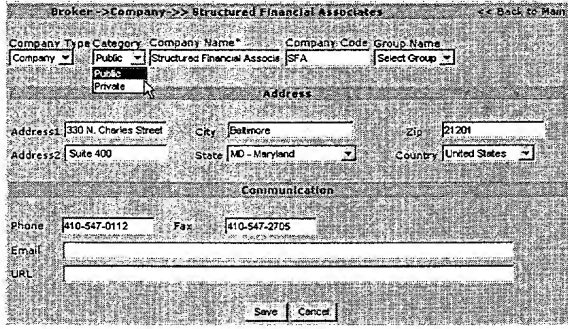


FIG 21

Managing your Diary (continued)

• Contact Listing at each Level

Branch List	Add New Branch	Contact List	Add New Contact
Name	Phone	Address	
Angel Vera	323-889-3837	500 Citadel Drive2nd Floor City of Commerce, Commerce, CA - California - 90040	
Carole Carlson	806-674-8367	302 W. Main StreetSuite 103, Avon, CT - Connecticut - 06001	
Chuck Berry	318-461-2034	7341 East 73rd Street Tulsa, OK - Oklahoma - 74131-2816	
Edward V. Hulen	810-733-7315	2503 S. Linden Road, Flint, MI - Michigan - 48532	
Jacqueline Viala	636-938-1249	607 Vista Hills Court, Eureka, MO - Missouri - 63025	
John Stanford Jr.	770-951-0696	6445 Powers Ferry Road#195, Atlanta, GA - Georgia - 30339	
Joseph Long	215-348-7244	350 S. Main StreetSuite 209, Doylestown, PA - Pennsylvania - 18901	

FIG 22

Managing your Diary (continued)

• Remember to use <Type = Company>, if desired to show under Drop Down List

Broker -> Company ->> Structured Financial Associates << Back to Main

Company Type Category Company Name* Company Code Group Name

Public Structured Financial Assoc SFA Select Group

Address

Address: 300 N. Charles Street City: Baltimore Zip: 21201

Address: Suite 400 State: MD - Maryland Country: United States

Communication

Phone: 410-547-0112 Fax: 410-547-2705

Email: URL:

Save Cancel

FIG 23

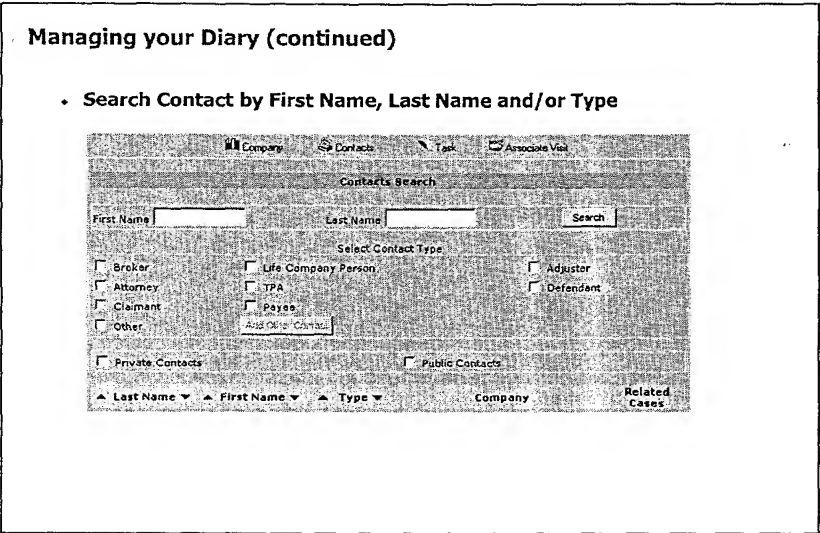


FIG 24

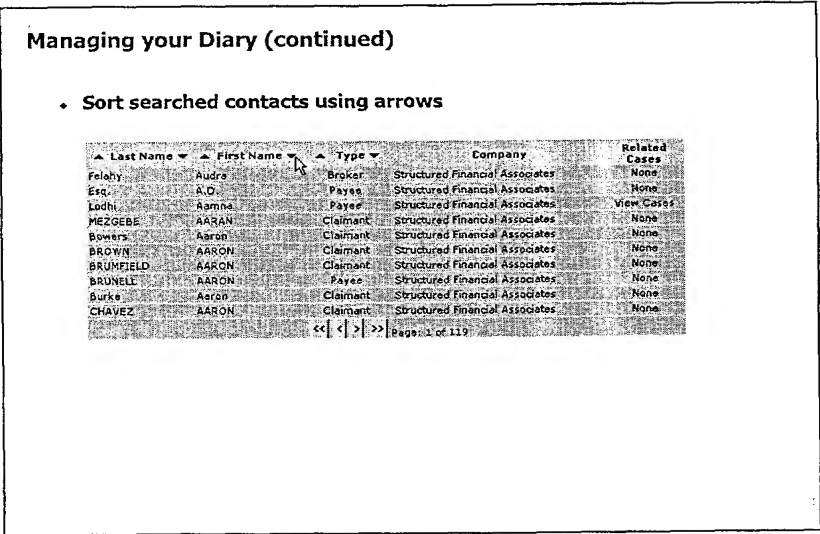


FIG 25

16/33

Managing your Diary (continued)

- View cases related to Contact from search result

▲ Last Name ▼	▲ First Name ▼	▲ Type ▼	Company	Related Cases
Wallmann	Achim	Broker	Diversified Settlements, Inc.	None
Swabson	Alan	Broker	Structured Security Co.	None
Frisbee	Alice	Broker	Structured Security Co.	View Cases
Copper	Alice	Broker	Grant Hickory & Associates	None
Hull	Allan	Broker	Structured Security Co.	None
Richardson	Allan	Broker	The Alliance Settlement Corp.	None
Paul	Amy	Broker	Summit Settlement Services	None
Fisher	Andrew	Broker	Settlement Options	None
Hull	Andrew	Broker	Settlement Associates & Insurance	None
Viera	Angel	Broker	Services, Inc.	None
			American Settlement Corp.	None

- Contact Category

- Public
- Private

FIG 26

Managing your Diary (continued)

- Check Box for

- Case Coordinator in Life Company
- Broker in Broker Company
- Attorney in Law Firm
- Claim Adjuster in Insurer / TPA
- Primary Contact in All Contacts

Edit Contact Information - > Brokers > Structured Financial Associates

Contact Category: ☒ Public ☐ Broker ☐ Primary Contact

Prefix: ☐ Mr. ☒ Mrs. ☐ Ms. ☐ Dr. ☐ Other

First Name: M. Middle Name: Last Name: Suffix: Title: CSSC

Address: 100 Satochya Road City: South St. Paul Zip: 55075

Address 2: Suite 144 State: MN - Minnesota Country: United States

Demographic: Contact

Phone: (551) 451-3667 (City) Phone: (Area) Phone: Cell:

Fax: Fax: (551) 451-4693

Email: afusbee@aol.com

Communication Type: ☒ Structured ☐ Other ☐ Email ☐ Fax

Notes:

Save Cancel

FIG 27

17/33

Managing your Diary (continued)

- Communication Type Check Box
 - StructureOnline Exchange
 - Fax
 - Email

Edit Contact Information >> Broker >> Structure Financial Associates
 Contact Category: Private ☐ Broker ☐ Primary Contact
 First Name: [] Middle Name: [] Last Name: [] Suffix: [] Title: []
 Address 1: 100 Satokeyards Road City: South St. Paul Zip: 55075
 Address 2: Suite 144 State: MN - Minnesota Country: United States
 Phone: (651-451-5567) (Day) Phone: [] (Eve.) Cell: []
 Pager: [] Fax: (651-451-4893)
 Email: afrusbee@aol.com
 Communication Type: ☒ Structure/Online ☒ Email ☒ Fax
 Notes: []
 Save Cancel

FIG 28

Managing your Diary (continued)

- Tasks – Open, Close, Details, Calendar

EZ-Broker
 New Case Case Management Reports Sync Administration
 Tasks
 Date: 1/9/2002
 Subject: Call statement for Date of Birth
 Status: Open
 January 2002
 Sun Mon Tue Wed Thu Fri Sat
 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
 Open Tasks Close Tasks Updat Tasks
 Subject:
☐ Place your 8 at the Broker
☐ Place your 8 at the Broker
☐ Generate a quote & follow

FIG 29

18/33

Managing your Diary (continued)

- Composing Non-case related task
 - From Home Page -> Compose
 - From Diary -> Task -> Compose

Enter New Task

Subject: Call Client for Date of Birth

Due date: 1/2/2002 Status: Open

Start date: 1/2/2002 Priority: High

Details: Call Client for Date of Birth and the Birth Certificate

Add Cancel

Attachment: super1220224603PM.doc

FIG 30

Managing your Diary (continued)

- Tracking visits to Clients (National Accounts only)
 - Name of the Insurance Company / Branch
 - Date of the Last Visit
 - Purpose
 - Next visit schedule
 - Cases Received
 - Notes

Insurance Company Visit Log

Select Company: Search Company: Select:

Insurance Company: Select Company: Select Branch:

Activity: Introduction: Notes:

Number of Cases Received:

Select All Cases:

Notes:

Add Cancel

Last Visit	Insurance Company / Branch / Broker	Activity	Next Visit
12/12/2001	American States Ins Co of TX Division: State: Donald	Introduction	1/1/2002
12/12/2001	Transwest Express Co of TX Division: Robert Jeffrey	Received Cases	1/1/2002
12/12/2001	SAFECO National Insurance Co Broker: Luke John	No Return	1/1/2002
12/12/2001	Shenandoah Ins Co: Adam Warren	No Return	1/1/2002
12/12/2001	Allstate of America: The Broker: Adam Warren	Introduction	1/1/2002
12/12/2001	Chubb and Chubb: National Broker: Robert Jeffrey	Advise Training	1/1/2002

FIG 31

19/33

Searching for an existing Case (continued)

- From Home Page

- Most recently worked on 10 cases

Strickland Gettelman Case Monitoring	File No.	Case	Date	Status
SFAuser1219200118827AM	Paul vs. Manor Care	12/10/1999	LEAD ACCEPTED	
SFAuser1219200112943AM	John vs. Evans	6/7/2000	LEAD ACCEPTED	
SFAuser12172001181403PM	Shirley vs. UPS	10/12/1999	LEAD ACCEPTED	
SFAuser1219200113551AM	Sarah vs. Timberline Inc.	12/10/2001	LEAD ACCEPTED	
SFAuser1219200113274AM	Chris vs. Grada Corp.	4/9/1999	LEAD ACCEPTED	
SFAuser1218200119543AM	Larry vs. Hands & Associates	3/7/2001	LEAD ACCEPTED	
SFAuser1212200111904AM	Tramothy vs. United Airlines	11/10/2000	LEAD ACCEPTED	
SFAuser12172001103120PM	Chris vs. General Electric	3/8/2001	LEAD ACCEPTED	
SFAuser1219200118023AM	Larry vs. Whirlpool	10/12/2001	LEAD ACCEPTED	
SFAuser12172001144137PM	Charlie vs. EMC	4/8/1999	LEAD ACCEPTED	

[Click here for more...](#)

- Based on Past Due Tasks

Date	Case	Subject	Priority
11/10/2001	UHALT, CHARLES	Quote Followup - uhalt	
10:00:00 PM			
12/10/2001	UHALT, CHARLES	Quote Followup - uhalt	
12:40:00 PM			
11/09/2001	FUENTES, ALEX	Quote Followup - fuentes	
2:25:00 PM			
11/09/2001	FUENTES, ALEX	Quote Followup - fuentes	
3:25:00 PM			
10/11/2001	BRABER, MICHELLE	Text	
10/12/2001			
3:06:00 PM	PEACE, SHEILA*	Quote Followup - sheela	
10/24/2001			
7:04:00 PM	YAMADA, KERRY	Quote Followup - kerry	

FIG 32

Searching for an existing Case (continued)

- From Case Management

- Multiple Search Criterion

EZ-Broker

Search by Name:

 Case Number:

 Claimant:

 Driver:

 Defendant:

 Case:

Search by Case Type:

☐ Completed

☐ Other

☐ Pending

☐ Unresolved

☐ Workers Compensation

Search by Case Status:

☐ LEAD ACCEPTED

☐ CASHED

☐ AS QUOTE

☐ SS QUOTE LOCK IN

☐ SS QUOTE AC-CEPTED

☐ SS QUOTE REJECTED

☐ STUCK ON TRANSFERRED

☐ SS QUOTE PLACED

☐ FIRST PAYMENT MADE

☐ COMMISSION RECEIVED

☐ COMMISSION REFUNDED

FIG 33

Searching for an existing Case (continued)

- From Diary
 - Based on Company of any Type

The screenshot shows a software interface with a top navigation bar containing icons and labels for 'Company', 'Contacts', 'Task', and 'Associate Visit'. Below this, a section titled 'Company' contains a 'Company type' dropdown menu set to 'Select Company Type', a 'Add' button, and a 'Search' button. At the bottom, there are three columns: 'Company Name' with a dropdown arrow, 'Place', and 'Related Cases'.

FIG 34

Searching for an existing Case (continued)

- From Diary
 - Based on Contact Person of any Type

The screenshot shows a software interface with a top navigation bar containing icons and labels for 'Company', 'Contacts', 'Task', and 'Associate Visit'. Below this, a section titled 'Contacts Search' contains 'First Name' and 'Last Name' input fields, and a 'Search' button. Underneath is a 'Select Contact Type' section with several checkboxes: 'Broker', 'Attorney', 'Claimant', 'Other', 'Life Company Person', 'TPA', 'Payee', 'Adjuster', and 'Defendant'. There is also an 'Add Other Contact' button. At the bottom, there are checkboxes for 'Private Contacts' and 'Public Contacts', and a row of column headers: 'Last Name' with a dropdown arrow, 'First Name' with a dropdown arrow, 'Type' with a dropdown arrow, 'Company', and 'Related Cases'.

FIG 35

Generating a Quote for Fully Integrated Life Company (continued)

- Select Claimant & Life Company; Click "Enter Quote Data"

FIG 36

Generating a Quote for Fully Integrated Life Company (continued)

- Select the Rate Series; Save the Quote

FIG 37

22/33

Generating a Quote for Fully Integrated Life Company (continued)

- **Start adding benefits & click "Calculate"; Save at the end**

[illegible]

FIG 38

Generating a Quote for Partially Integrated Life Company (continued)

- **Select Claimant & Life Company; Click "Generate Quote"**

Quote for case > Larry vs. Whirlpool

Select Preferred Tool and Program to Generate a New Quotation

Client/est: Hall Mike

Select Tool: Liberty Life Assurance Co. of Boston

Generate Quote QIS Import Enter Quote Data

FIG 39

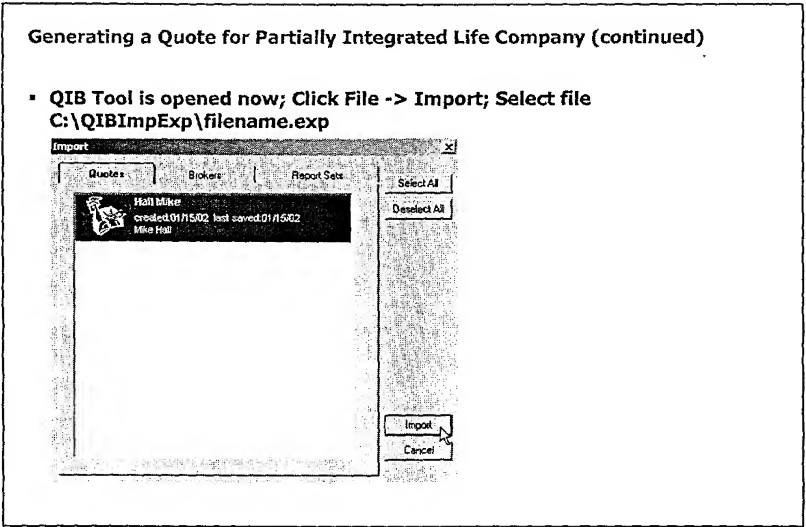


FIG 40

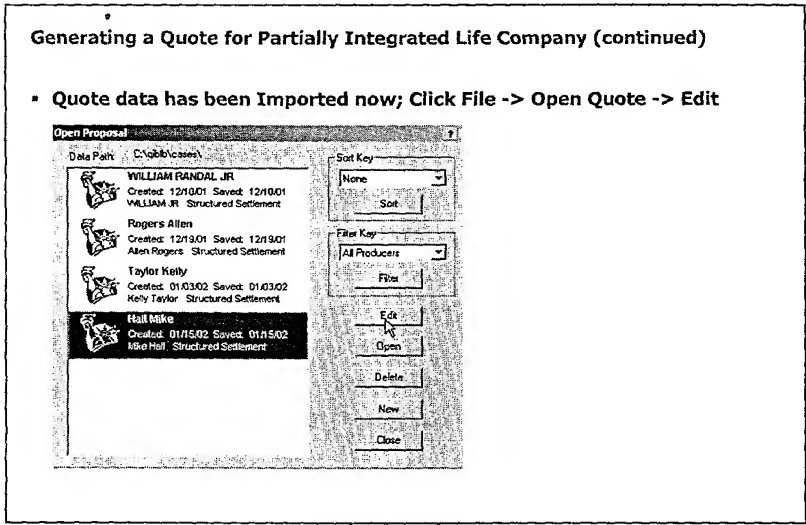


FIG 41

Generating a Quote for Partially Integrated Life Company (continued)

- Check all imported information from Quote Specification or Quick Quote window.
- Start adding benefit information -> Add Benefit
- Quote String Carryover between Tools (Change mode if not mentioned)
- Save -> Quote Name -> OK

Save As

Quote Name:

OK Cancel

Quick Quote

Quote Date: 01/15/2002
Purchase Date: 01/15/2002
Assignment: Yes
State: HI
Rate Series: HAIL002 01/02/2001

Single Claimant
First: Mike
Last: Hail
DOB: 01/01/1965
Age: 37
Sex: Female
Rate Age: 37
Multiple/Host: No
Diamond? No

Benefits

Type	Benefit Amount	Mode	First Pay	Yrs	Mos	End	Incl 2	Premium
L	\$2,000.00	M	02/02/2002	1	8	09/12/2010	1.00	\$383,876.00

Client: 37 Life \$2,000 M 02/02/2002 18 1.00 \$383,876
M Hail 37 Life \$1,000 M 02/15/02 20.0 0.00 \$175,162

Guar: \$380,180 Exp: \$2,032,812 Fees: \$300.00 Total Premium: \$563,338.00

Tab to next control

Preview Quick Print Clear Save Quit

FIG 42

Generating a Quote for Partially Integrated Life Company (continued)

- To Export Quote Data; File-> Export
- Select file C:\QIBImpExp\claimantname.exp
-> Click on Save

Export

Quotes Brokers Report Sets

Select All
Deselect All

WILLIAM RANDAL JR
created 12/10/01 last saved 12/10/01
WILLIAM JR

Rogers Allen
created 12/19/01 last saved 12/19/01
Allen Rogers

Taylor Kelly
created 01/03/02 last saved 01/03/02
Kelly Taylor

Hail Mike
created 01/15/02 last saved 01/15/02
Mike Hail

HailMike
created 01/15/02 last saved 01/15/02
Mike Hail

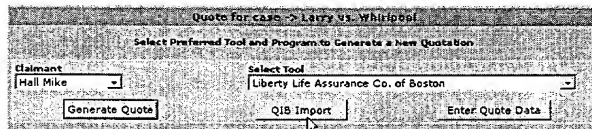
Export
Cancel

FIG 43

25/33

Generating a Quote for Partially Integrated Life Company (continued)

- Click on QIB Import



- Click on Browse and select the file to Import; Click on Import -> Close

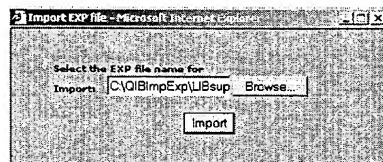
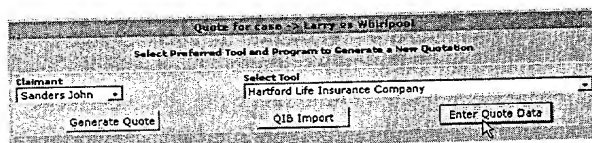


FIG 44

Generating a Quote for not Integrated Life Company (continued)

- Select Claimant & Life Company; Click "Enter Quote Data"



- Copy / Paste the data from Life Company Tool manually (Unfortunately)

FIG 45

26/33

Generating a Quote for not Integrated Life Company (continued)

- **Select the Rate Series; Save the Quote**
- **Start adding benefits & click "Calculate"; Save at the end**

THE HARTFORD

Quote #0450272 / 11/15/2002
 Contract #0450272 / 11/15/2002

Auto Series: A-AJZ Rating: TR-00000 Level: P-000000 Preclaim: TR-000000
 Assigned: Hartford Commercial Insurance Broker Service Company City: CT, Connecticut
 Policy #: Policy Date: Reprint History:

John Vanders | Unaffirm Cash: \$10,000.00
 DOB: 11/11/1960 Age: 32 Sex: Male Life Exp: P Age: 32 Surv: 100
 Earl Kirk | Unaffirm Cash: \$1,300.00
 DOB: 11/22/1971 Age: 31 Sex: Male Life Exp: P Age: 31 Surv: 100

Status Information
 Social Life Co. Approval: R/Ws (Exp-): Accepted Date: Verified Date:

Notes:

Add to the Benefit		Rate		Per. of Policy		Schedule	
Benefit Type	Amount \$	Annual	Rate	Per. of Policy	Rate	Per. of Policy	Rate
Temporary Cash	1,000.00	Annual	10	1000	1000	1000	1000
Start Date	11/15/2002	Unaffirmed	11/15/2002	1000	1000	1000	1000
End Date	11/15/2002	10,000.00	10,000.00	10,000.00	10,000.00	10,000.00	10,000.00

Add to Coverage

FIG 46

Proposal - Documents (continued)

- **Select the Quote & Appropriate Proposal Template; Click “Generate Proposal”**

Proposal

File Edit View Tools Help

Select Template C:\so\broker\template\proposals\proposd10.doc

Quote No. PMQuote1520072515

Quote Name Full and

Type Liberty Life Assurance

Benefit \$280,160.00

City of Boston

Select ☒ Life \$2,000.00 Monthly 2/1/2002 - 1 - 9/2/2003 - 1 \$399,876.00

☒ Life \$1,000.00 Monthly 2/1/2002 - 20 - 0 2/15/2022 - 0 \$175,162.00

☐ guaranteed MISHALL 2002 Accumulated Aistair Life Insurance Company \$709,600.00

Select ☒ Certain \$5,000.00 Monthly 2/1/2005 - 0 - 4/1/2072 - 0 \$14,573.00

Notes

Generate Quote Proposal

FIG 47

Cover Letter - Documents (continued)

- Creating a Cover Letter to Life Company

Quotes, Proposals and Cover letters

Quote Name	Life Carrier	Status	Benefit	Cover Letter
FoxProCase977316	LIBERTY LIFE	Accepted	\$0.00	Cover Letter
MICHAELSABATINO/2001	Allstate Life Insurance, Company		\$202,000.00	Cover Letter

Cover Letter -> CoverLetter12-3-200112-50-59PM.doc
Proposal Document -> Q_Michael Sabatino12-3-200112-44-45PM.doc

Quote Name	Life Carrier	Status	Benefit	Cover Letter
MICHAELSABATINO/2001	Allstate Life Insurance, Company		\$24,240.00	Cover Letter

Cover Letter for -->Allstate Life Insurance, Company

Select template file: C:\SSO\ezbrocker\template\CoveringLetters\coveringletter.doc

Generate Cover Letter for:

Select Company: Use:

Generate Cover Letter Done

FIG. 48

Cover Letter - Documents (continued)

- Creating a Cover Letter to Insurance Company

Quotes, Proposals and Cover letters

Quote Name	Life Carrier	Status	Benefit	Cover Letter
FoxProCase977316	LIBERTY LIFE	Accepted	\$0.00	Cover Letter
MICHAELSABATINO/2001	Allstate Life Insurance, Company		\$202,000.00	Cover Letter

Cover Letter -> CoverLetter12-3-200112-50-59PM.doc
Proposal Document -> Q_Michael Sabatino12-3-200112-44-45PM.doc

Quote Name	Life Carrier	Status	Benefit	Cover Letter
MICHAELSABATINO/2001	Allstate Life Insurance, Company		\$24,240.00	Cover Letter

Cover Letter for -->Allstate Life Insurance, Company

Select template file: C:\SSO\ezbrocker\template\CoveringLetters\coveringletter.doc

Generate Cover Letter for:

Select Company: Use:

Generate Cover Letter Done

FIG. 49

28/33

Post Settlement Document - Documents (continued)

- **Creating a Post-Settlement Document from Template**

Settlement Documents for Accepted Quotes

Quote Name -> FoxProCase977316 Quote Funding

Settlement Document -> LLAC Application12-3-200112-59-26PM.doc

Settlement Document -> LLAC Application12-3-200112-59-44PM.doc

Select template file [LLAC Application.doc] Generate Document Doc Tracking

FIG 50

Document Attachment - Documents (continued)

- **Attaching a Document for e-filing**

- Any Scanned Data Files
- Any Electronically Generated Documents (Word, Excel, etc.)

Attachments

Title	File Name	Owner	Document's	Delete
Birth Certificate	Birth Certificate.doc	super super	Scanned Birth Certificate	Click
School Record	School Record.doc	super super	School leaving certificate	Click

Case: SABATINO, MICHAEL

Title:

Reference:

File: Browse... Upload

Uploaded file: School Record.doc

More Upload Done

FIG 51

29/33

Quote Acceptance Update to Case

- Click on the Quote to view details
- Enter the Date in Quote Accepted Field;
- Don't forget to Save

Quote Modified: 12/3/2001

Quote Name: MICHAEL SABATINO/2001 Created: 1/20/2001 Expires: Purchase: 12/3/2001

Rate Series: POL-2000M Effective: 10/10/2001 Ass. Comp: Select one Ass. Fee: Fees/Expenses:

State: Select One Tax:

☐ Michael Sabatino (Upfront Cash)

DOB: 1/10/1945 Age: 56 Sex: Female Life Exp: 5 Age: 60 Surv: 100

Status Information

☐ Special Life Co. Approval ☐ Rate Lock-In Accepted date: 10/10/2001 Verified date:

Notes:

Life: Michael Sabatino

Amount \$: \$100,000.00 Mode: Annual No. of Pmts: 1 COLA(%): 0 (4 Years, 0 Months)

Start Date: 12/1/2001 Last Pmt. Date: Guaranteed Expected Premium: \$274,520.00 Delete

Add New Benefit

Benefit Type: Amount \$: Mode: No. of Pmts: COLA(%):

Start Date: Last Pmt. Date: Guaranteed Expected Premium: Calculate


Save Cancel

FIG 52

Quote Verification Update to Case

- HOCA verifies an accepted Quote
 - Current Rate Series
 - Exception of Special Approval of Life Company
 - Underwriting Guidelines
 - One more rule

SABATINO, MICHAEL



Quote Modified: 12/3/2001

Quote Name: MICHAEL SABATINO/2001 Created: 1/20/2001 Expires: Purchase: 12/3/2001

Rate Series: POL-2000M Effective: 10/10/2001 Ass. Comp: Select one Ass. Fee: Fees/Expenses:

State: Select One Tax:

☐ Michael Sabatino (Upfront Cash)

DOB: 1/10/1945 Age: 56 Sex: Female Life Exp: 5 Age: 60 Surv: 100

Status Information

☐ Special Life Co. Approval ☐ Rate Lock-In Accepted date: 10/10/2002 Verified date:

Notes:

FIG 53

30/33

Tracking Documents

- Track any document from your e-file

Settlement Documents for Accepted Quotes

Quote Name -> MIKEHALL/2002 Quote Funding

Select template file [JGA - AAC.doc] Generate Document Doc Tracking

Case Name: [Lenny vs. [redacted]] Case Number: [Superior 13700262701]

Life Company: [Adriatic Life Insurance Company] Initial Cash Amount: []

Premium: \$14,373.00 Date Settled: 1/1/2002 Policy Number: []

Are all documents in compliance with the law? ☐ Documents Completion Date: []

Document Info	Field Office		Received Date	Head Office		N/A
	Sent to N/D	Will Be Sent		Was Sent	Will Be Sent	
Original Application						<input checked="" type="checkbox"/>
Copy of Application						<input checked="" type="checkbox"/>
Information Form						<input checked="" type="checkbox"/>
Date Sole Case sheet faxed						<input checked="" type="checkbox"/>
Date Sold Case sheet approved						<input checked="" type="checkbox"/>
Purchase Date						<input checked="" type="checkbox"/>
Link-In Sent						<input checked="" type="checkbox"/>
Approved Link-In Received						<input checked="" type="checkbox"/>

FIG 54

Communicating with Support, Home Office, Clients & Vendors

- Important Communication Check Box on Contact Information in Diary

Edit Contact Information -> Broker -> Structured Financial Associates

Contact Category: [Private] ☒ Acting Broker ☐ Primary Contact

Prefix: [Select] First Name: [ANDERSON, PAU] Middle Name: [] Last Name: [] Suffix: []

Address: [P.O. BOX 1808] City: [SALT LAKE CITY UTAH] Zip: [84110-1808]

Address2: [] State: [UT - Utah] Country: [Select One]

Communication: Phone: [801-575-7811] (Day) Phone: [] (Eve.) Cell: []

Pager: [] Fax: []

Email: [info@sfainc.com]

Communication Type: ☐ DATA STREAM ☒ E-MAIL ☒ FAX

Notes: []

Update Cancel

FIG 55

31/33

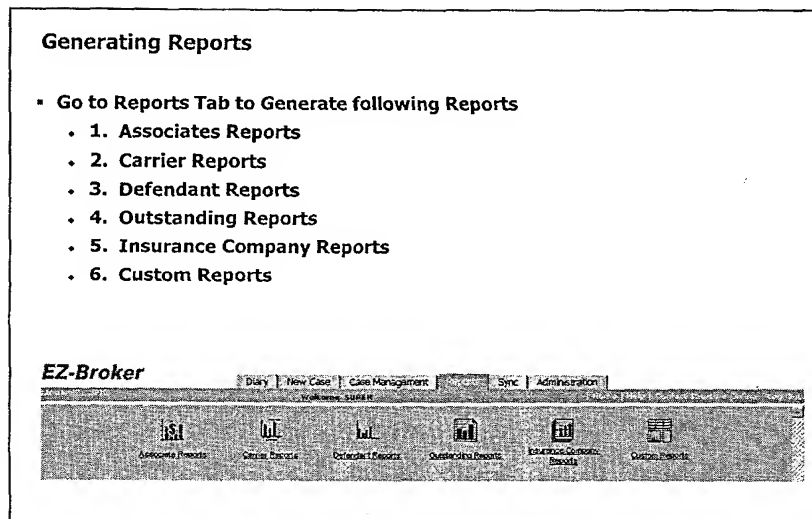


FIG 56

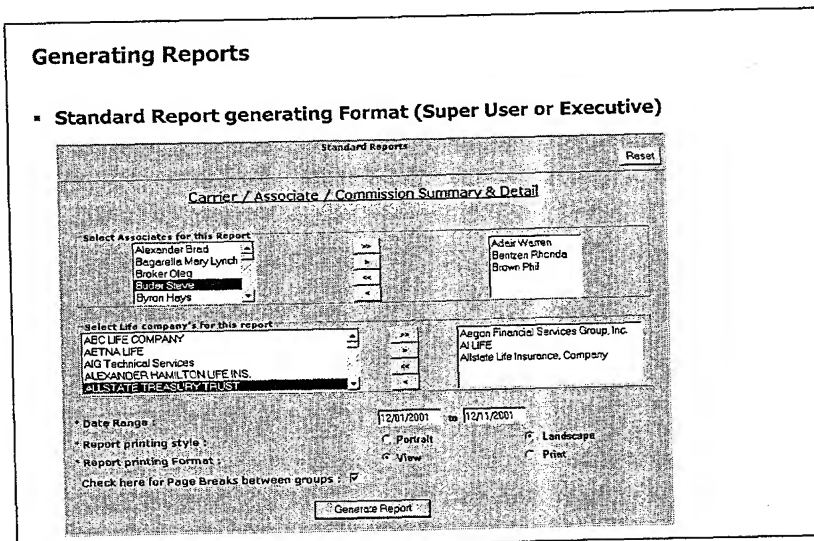


FIG 57

32/33

Generating Custom Reports (continued)**▪ Go to Custom Report Generation**

Customized Report

Select Fields

ADJUSTER ASSOCIATE ATTORNEY FIRM CASE NAME CASE STATUS CASE TYPE CLAIMS FILE NUMBER COMMISSION PAID COMMISSION RECEIVED DATE OF LOSS DEFENDANT NAME	MOVE REMOVE	ASSOCIATE CODE AUTHORIZED AMOUNT CASE NUMBER CLAIMANT NAME COMMISSION PAID DATE
--	----------------	---

Goto... NEXT >>

FIG 59

Generating Custom Reports (continued)

Customized Report - Step 2

Select conditions for Report

For date values, please enter values in [mm-dd-yy] format.

DEMAND AMOUNT <= 20000 Add Condition

MS_BROKERASSOCIATE_TITLE = 'sami'
CASEINFO.CASE_CAPTION = 'ran hatcher'
ASSOCIATE_COMMISSION.NET_ASSOCIATE_PREMIUM_AMOUNT > 10000 Delete Condition

Select Grouping Columns and Aggregates

SUM AVG MAX MIN COUNT OF AUTHORIZED AMOUNT COMMISSION RECEIVED ADJUSTER ASSOCIATE ASSOCIATE CODE ATTORNEY FIRM AUTHORIZED AMOUNT Add Group

SUM(CASE_INSRER.AUTHORIZED_AMOUNT) BY MS_BROKERASSOCIATE_TITLE
SUM(ASSOCIATE_COMMISSION.NET_BC_COMM) BY MS_BROKERASSOCIATE_TITLE Delete Group

Cancel Proceed to Step 3

FIG 60

33/33

Generating Reports

- Standard Report generating Format (Associate, Support or Client)

Standard Reports Reset

Associate Visit to Insurance Company - Summary

[Click here for insurance company list](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Select Insurance company's for this report

A GUILFORD TRANS INDUSTRIES CO	→	A PACIFIC TELESIS COMPANY
A.M. LITHOGRAPHY	→	ACACEMV LIFE INSURANCE COMP
AAA MountainWest Ins Co	→	ACCEPTANCE INSURANCE COMPANY
ACCELERATION NATIONAL INS	→	
ACCIDENT FUND COMPANY	→	

Date Range : 12/01/2001 to 12/31/2001

Report printing style : ☐ Portrait ☐ View ☐ Landscape ☐ Print

Report printing Format :

FIG 58

Generating Custom Reports (continued)

Customized Report - Step 3

Pick the Report Options

* Custom Report Title: Custom Reports for Month of

* Custom Report Sub-Title : November 2001

Select Print Option: ☒ Portrait ☐ Landscape

☒ Include page-breaks between groups

Select an Option for the report:

☐ Print Report [This will automatically redirect you]

☒ View Report [The report will be opened within]

Save Report Query : ☒

Enter Report Name: monthly reports

FIG 61